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1977 OUTLOOK FOR WORLD MEAT PRODUCTION AND TRADE

Production of meat in the key commercial markets of the world (the United States, Canada, the European Community (EC), and Japan) in 1977 is forecast to remain practically unchanged from 1976 levels. Beef production is expected to be down 4.7 percent because of 5 percent lower production in both the United States and the EC, but pork is expected to increase 7.4 percent. Poultry production is forecast to increase 2 percent, while sheep meat production is expected to remain at about last year's levels.

In the four key commercial markets net meat imports are forecast to increase by about 42,000 tons (carcass weight) in 1977. Most of the gain is expected in beef and veal imports, and will more than compensate for the greater quantity of pork expected to be exported from the EC this year.

Net beef imports into the major markets are expected to be up by about 157,000 tons (carcass weight), principally because of increased imports by the EC and the United States. U.S. beef imports are expected to be up because of the greater quantities permitted under this year's voluntary import restraint program. The EC is expected to return to a net importer position in 1977 as a result of herd adjustments and rising cattle prices, which have caused more liberal import policies. In Canada, an import program designed to hold down entries of beef and veal from supplying countries is also in place for 1977. However, increased domestic meat production is expected to limit Japanese imports this year.

In the major exporting countries -- Australia, New Zealand, Argentina, Uruguay, and Central America -- beef and veal production is expected to decline 3 percent to 6.7 million tons in 1977. This level of production, while below the record 1976 level, is the second highest on record.

Mexico, which may not much longer be a major exporter because of increased domestic demand for beef, is expected to have an 8 percent increase in beef production. In Australia and New Zealand, beef production is expected to decline 5 percent and 16 percent, respectively, because of heavy 1976 slaughterings. Argentine beef production is expected to be down 4 percent because of herd rebuilding, while Uruguayan

production is expected to be up 5 percent, with herd numbers continuing to decline. In Central America, a slight increase in beef production is forecast as cattle herds stabilize after several years of rapid growth.

With the imposition of restrictive import measures by the EC and Japan, the major beef and veal exporting countries of Argentina, Australia, New Zealand, and Uruguay have had to diversify markets signigicantly over the past 2 years. New or expanded markets have been developed in Africa, the Far East, and the Middle East, of which Egypt, Hong Kong, Malaysia, and Iran were the most important. Beef and veal exports to these areas in 1975 were 182,000 tons, (carcass weight) compared with the relatively low 1974 level of 53,000 tons. For the first 10 months of 1976, exports to these areas were about equal to the 1975 shipments and for the entire year probably will surpass the record 1975 volume. Competition for these markets is expected to remain keen this year.

Last year, the Soviet Union, once again purchased the majority of its red meat and poultry imports from Western suppliers, as was the case in 1974 and 1975. Eastern Europe, a new factor in the import picture, also emerged as a major purchaser of red meat and poultry from Western suppliers in 1976. Purchases of red meat for 1977 delivery to the Soviet Union as of late December totaled about 69,000 tons (product weight), and about 23,000 tons of broilers also were bought for 1977 delivery. Poland has purchased about 54,000 tons of beef, primarily from Australia, New Zealand, and Argentina, for delivery in the first half of this year. Yugoslavia purchased 14,000 tons of beef from New Zealand, and is presently finalizing an 8,000-ton purchase of beef from Australia for 1977 delivery.

It is doubtful that the large meat purchases from the West in recent months will continue beyond the first half of 1977, as Soviet and East European livestock numbers are increasing and meat production in this area should return to normal levels, barring unforeseen adverse weather.

The East European and Soviet sales should alleviate the burdensome beef supply situation in Australia and New Zealand, where stock levels reached a record 100,000 tons (product weight) in each country in early October 1976.

Major Importers

United States

Total U.S. meat production for 1977 is forecast to be 23.5 million tons, slightly above the 1976 level. Of this total, beef and veal production is forecast at 11.6 million tons, a 4.9 percent decrease from the year-earlier level of 12.2 million tons. Pork production is expected to be 6.3 million tons, up 13.9 percent, while poultry output is forecast at 5.5 million tons, about even with last year's level.

For 1977, nonfed cattle slaughter should be below 1976 levels throughout most of the year. In addition, the lower inventory of cattle on feed since October should lead to less fed beef during the winter and through much of the spring. However, lower corn prices and higher steer prices this fall and winter have caused higher placements of cattle on feed and will increase output of fed beef in the late spring and summer of 1977.

U.S. hog slaughter in the first half of 1977 is expected to be up 20 percent from the 34 million head slaughtered in the same period of 1976. Second-half 1976 farrowing intentions showed a 5 percent gain over 1975 levels, indicating hog slaughter for the last 6 months of 1977 may approach 42 million head--6 percent above slaughter in the last half of 1976. The resultant 14 percent increase in pork production in 1977 is expected to keep hog prices below last year's levels through most of the year.

Net meat imports into the United States this year are expected to total 785,000 tons (carcass weight)--about 93,000 tons greater than in 1976. Increased entries of beef and pork are expected to provide most of the gains.

For 1977, imports of beef and veal are forecast at 895,000 tons (carcass weight), almost 2 percent higher than the 1976 level. Imports of fresh, chilled, and frozen beef and veal (i.e., meat subject to the U.S. Meat Import Law) will increase about 3 percent above the 1976 level. Negotiations with the major supplying countries to limit meat imports began December 6. This year's program is designed to insure that imports of meats subject to the Meat Import Law will not exceed about 581,000 tons (product weight), the trigger level for the imposition of quotas in 1977.

Canada, which has not been a participant in previous restraint programs, will be covered by the 1977 arrangements. In addition, meat processed in U.S. Foreign-Trade Zones, trust territories, and possessions from foreign meat subject to the Law and subsequently entered into the customs territory of the United States for consumption will be counted against the 1977 limitation by country of origin.

Net pork imports into the United States this year are expected to increase by 70,000 tons (carcass weight) from 1976's low 5,000 tons. Greater entries of canned hams from EC and reduced U.S. shipments of pork to Japan account for the net import gain.

European Community

EC meat production in 1977 is forecast to remain near the 1976 level of 17.9 million tons. Higher pork and poultry output is expected to compensate for a 5 percent decline in beef and veal production.

Although cattle slaughter may remain close to last year's levels through much of the winter, lower slaughter weights as a result of decreased feed supplies will tend to dampen beef and veal production during this period. For the remainder of 1977, the EC cattle cycle should start turning toward a rebuilding phase. The reduced cattle inventory at the end of 1976 will reduce cattle slaughter and beef and veal production in 1977. Cattle prices should increase somewhat, which in turn should provide incentives for EC farmers to begin rebuilding herds.

Net EC meat imports for 1977 are forecast to increase 40 percent to about 350,000 tons (carcass weight). The Community is expected to return to a net beef and veal import position in 1977 and a net pork export position.

Despite the expected decline in EC production, EC beef imports in 1977 probably will remain at relatively low levels. Currently, imports of beef and veal are allowed only under the GATT quotas, special concessions to several African, Caribbean, and Pacific (ACP) countries, and the "jumelage" linked sales program. However, the EC agricultural ministers have agreed to a modified beef import system, which, effective April 1, 1977, will eliminate the "jumelage" program, though the GATT quota and the concessions to the ACP countries will remain intact. This beef import system will retain the variable levy system for beef imports, and add to it a provision under which the percentage of the basic import levy applied would increase to as much as 114 percent when cattle prices fall below specified levels. This system will help to hold imports from third countries well below the levels witnessed before tightened import control programs began in 1974.

Economic difficulties in the United Kingdom and Italy will tend to dampen the import requirements of these countries. Since EC pork and poultry production and retail meat prices are expected to continue increasing this year, 1977 beef and veal consumption should remain at about the 1976 level. With year end intervention beef stocks relatively high at 260,000 tons (product weight), EC beef and veal imports from third countries in 1977 should total only about 300,000 tons (carcass weight). Of this total, about 52,000 tons will be imported under the GATT quota and 38,000 tons under the ACP program.

For 1977, EC exports of beef and veal to third countries are forecast to total about 100,000 tons (carcass weight). The current EC subsidy for beef exports from Ireland and the United Kingdom to the United States is near zero. Neither Ireland nor the United Kingdom is expected to export beef to the United States in 1977.

As a result of increased production, the EC is expected to be a net exporter of 29,000 tons (carcass weight) of pork in 1977, compared with net imports of 87,000 tons in 1976.

Canada

Canadian meat production is forecast to decline about 2 percent in 1977, owing to reduced beef and veal output that is not expected to be compensated by larger pork production.

Beef and veal production in Canada is forecast at 1.092 million tons in 1977--down 3.6 percent from the 1976 level. Cattle slaughter in 1977 is forecast at 5.1 million head--down 6 percent from the 1976 total. Slaughter weights are expected to be up about 1 percent because of a reduction in female and calf slaughter, and possibly some increase in slaughter of grain-fed animals. Canada's pork production is forecast at 485,000 tons--up 2 percent from the 1976 level.

Net meat imports are expected to decline from the record 1976 volume of 164,000 tons (carcass weight) by about 50,000 tons this year. Import controls on beef and veal entries will be the principal reason for the decline. In late December, the Canadian Government announced that 1977 beef and veal entries would be limited to 66,000 tons (product weight), of which the U.S. share would be 17 percent and Australia's and New Zealand's about 41 percent each.

Japan

In 1977, Japanese meat production is expected to increase 8.1 percent to 2.2 million tons. Beef production is expected to be up 13 percent to 320,000 tons; pork, up 6.5 percent to 970,000 tons; and poultry, up 8 percent to 910,000 tons.

In 1977, calf slaughter is expected to remain low, but cattle slaughter is forecast to increase 12.5 percent to 1.05 million head. The cattle herd is expected to continue to expand through 1977, but at a slightly lower rate than in 1976.

Because of lower domestic production, beef imports in 1976 were 128,000 tons (carcass weight). Imports in 1977 are not expected to be as large because of increased domestic production. Imports are currently forecast at 112,000 tons (carcass weight), down 12.5 percent from 1976 entries.

On November 16, 1976, the Japanese announced the second half beef import quota for Japanese fiscal year (JFY) 1976 (April 1976-March 1977) at 20,000 tons (product weight). Under pressure from Australia, a further 20,000 tons was allocated on January 16, 1977. This brought the general quota allocation up to 40,000 tons compared with 48,000 tons for the first half of the fiscal year. According to Japanese sources, the total beef import allocation in JFY 1976 was 93,400 tons, compared with 85,000 tons JFY 1975.

As a result of rising domestic pork production, Japanese pork imports in 1977 are forecast to decline 35 percent to 110,000 tons (carcass weight). Sheepmeat imports are expected to remain at about the 1976

level of 190,000 tons (carcass weight). However, recent Australian sales of mutton to the Soviet Union may cause pork to become more attractively priced for use in manufactured products during the year. If this occurs, pork imports may rise above current expectations and mutton imports could decline.

USSR

Beginning 1977 livestock numbers, primarily hog and poultry inventories on all types of economic holdings showed an increase over 1976 levels. The remaining livestock categories were either constant or showed a reduction in numbers. As of January 1 total cattle inventories were 110.3 million head, a little less than 1 percent. Cow numbers were unchanged at 42 million head. Hog numbers increased 9 percent during 1976 to 63 million head and sheep and goat numbers dropped by 2 percent to 145 million head. However, poultry numbers probably increased by about 6 percent to an estimated 780 million head.

As a result of these increased inventories, meat production in 1977 is expected to recover from the past year's reduced output. According to Soviet data, meat production in 1976 reached the planned target of 13.3 million tons--a 12 percent decline from 1975 output. Beef and veal production, including fats and offals, was 6.2 million tons; pork, 4.5 million tons; mutton and goat, 0.9 million tons; poultry production, 1.4 million tons; and other meats, 0.3 million tons.

With a 12 percent drop in meat output in 1976, the Soviet Government imported meat from western suppliers to enable herd rebuilding to continue. Soviet imports of meat and meat products are expected to have totaled 350,000 tons (product weight) in 1976--about 50 percent of which will be from western countries.

In 1977, meat imports are not expected to be as large as in 1976, owing to increased domestic availabilities. Through January, about 100,000 tons of meat have been contracted for delivery from western suppliers in the first 6 months of this year.

Eastern Europe

Despite several of the East European governments attempts to maintain livestock numbers in 1976, overall inventories on January 1, 1977, are expected to show a reduction in all categories except sheep and goats. East European cattle numbers are expected to total 31.7 million head, a 1 percent decline; hogs, 56.0 million head, 2 percent decline; and sheep and goats, 25.8 million head, a 2 percent increase. The reduction in inventories as a result of last summer's drought, which reduced feed supplies and resulted in slaughterings well above normal seasonal levels.

Meat production in 1976 is estimated to have been 6.8 million tons--a 13 percent increase over the 1975 level of 6.1 million tons. With the rebuilding of herds--at least in the first half of 1977--meat production will probably drop in 1977 from the high 1976 levels. Faced

with a possible tight meat supply situation in the summer of 1977, the East European countries are expected again to supplement domestic meat supplies with meat imports. In 1976, Eastern Europe--especially Poland and Yugoslavia--emerged as major purchasers of red meat and poultry from Western Suppliers.

Poland purchased about 54,000 tons of beef, primarily from Australia, Argentina, and New Zealand for delivery in the first half of 1977. Yugoslavia purchased about 14,000 tons of beef, primarily from New Zealand, and is presently finalizing an 8,000 ton purchase of beef from Australia for 1977 delivery. It is anticipated that other East European countries may be in the market during the first half of 1977.

Yugoslavia

A moderate expansion of the Yugoslav livestock industry is anticipated for 1977. January 1, 1977, cattle numbers are expected to total 5.8 million head--a 2 percent increase from the year-earlier level; hog numbers, 7.2 million head--an 11 percent increase; and sheep and goat numbers, 8.0 million head--a 3 percent increase over year-earlier levels.

Red meat production for 1976 is estimated at 933,000 tons (carcass weight basis)--a 5 percent decline from the 1975 level. Beef and veal production for 1976 is estimated at about 360,000 tons; pork output at 520,000 tons; and mutton and lamb, 52,000 tons.

Major Exporters

Australia

Beef and veal production in Australia is forecast at 1.75 million tons in 1977--down 5 percent from the 1976 total. If pastoral conditions remain good, slaughter weights will be higher, but slaughter numbers are expected to decline by about 9 percent because of lower inventory numbers caused by high slaughter in 1976 and some restocking--especially in areas stricken by drought in 1976.

Cattle slaughter for the first 9 months of 1976 averaged 16 percent and calf slaughter 30 percent above year-earlier levels. Cattle numbers, according to the projected March 31, 1977, survey, may be 300,000 to 800,000 head below the estimated 33.3 million head on hand March 31, 1976.

Domestic consumption of beef and veal will likely decline appreciably in 1977 because of the recent 17.5 percent devaluation of the Australian dollar and some improvement in the export market. Both developments will cause Australian retail beef prices to rise. Beef and veal consumption is projected at 855,000 tons in 1977, compared with an estimated 955,000 tons for 1976. If the projected 1977 levels for production and consumption hold, the residual supplies of beef and veal available for export in 1977 will be approximately 900,000 tons (carcass weight)--600,000 tons (product weight). This represents a small increase over the 580,000 tons (product weight) estimated for 1976 exports.

Australian beef exports to the United States in 1977 will be at about the same level (295,000 tons) as for each of the 2 previous years. This anomaly of Australian exports remaining at a constant level while U.S. imports of beef and veal from Australia were increasing is the result of Australia's schedule of shipping which was not alined in 1975 and 1976 to the U.S. restrictions on imports from Australia for these 2 years.

In 1977, Japan is expected to continue to be Australia's second best market for beef. However, the short-term prospects for exports to Japan have dimmed somewhat because of large supplies and lower beef and pork prices in Japan. Early in 1976, Australian exports of beef to Japan were projected to reach 80,000 to 90,000 tons (product weight). This estimate for 1976 has been revised downward to 70,000 tons, and the current estimate of 80,000 tons for 1977 may be optimistic.

Sales of Australian beef to the Soviet Union were slow in materializing in 1976, but exports to the USSR, now estimated at 12,000 tons (product weight), are considered to be a valuable outlet for surplus Australian beef. Prices reported sales were 29 Australian cents per pound, f.a.s. The f.a.s. price for shipments for comparable beef to the United States at the time of the last Soviet sale was about 40 Australian cents per pound. Trade sources believe that the Soviets will buy large quantities of Australian beef for delivery early in 1977. Sales totaling 100,000 tons (product weight) are anticipated.

Exports of beef and veal to Canada totaled about 50,000 tons (product weight) in 1976. Since Canada will continue to control imports in 1977, Australian exports to that market will decline substantially.

Australian exports of beef to the EC are forecast to increase by 10,000 tons to a total of 20,000 tons (product weight) in 1977. Australia hopes to get 13,000 tons of the 38,500 tons, duty-free GATT quota, and a portion of the expected shortfall of the manufacturing beef "quota," possibly at reduced duty and levy rates. However, the level of exports to the EC could be higher or lower depending upon the degree of protection applied by the EC against imports.

The diversification program whereby Australian exporters earned entitlements to export meat to the United States is being phased out and replaced by a new scheme. The new program encompasses the immediate allocation to exporters of 60 percent of Australia's permitted level of beef and veal exports to the United States under the 1977 restraint agreement, with each exporter receiving an allocation based on his eligible credits carried over from 1976. However, this allocation of entitlements for individual exporters cannot exceed one-third of their 1976 carryover. The balance of the first 60 percent of the "U.S. quota" will be calculated and allocated on the basis of each exporter's shipments of beef and veal (excluding certain processed items) to all markets for the 12 months ending November 30, 1976.

The remaining 40 percent of the "U.S. quota" will be allocated in early May on the basis of performance to all markets, excluding the United States and Canada, for the 12 months ending April 30, 1977.

The new program will eliminate a considerable backlog of paper credits for beef exports to the United States which, reportedly, were worth as much as 25 cents per pound during much of 1976. At the same time the program offers the incentive (larger U.S. entitlements) to exporters to explore and develop more difficult or new markets.

New Zealand

Beef and veal production in New Zealand is forecast at 510,000 tons in 1977, about 95,000 tons below the 1976 level, but still a little above that of 1974. Record cattle slaughter of 2.5 million head for the year ending October 1976 undoubtedly resulted in herd reduction, with the largest percentage reduction occurring in South Island where many traditional sheep farms sold off their cattle and returned to sheep production. The total cattle slaughter forecast of 2.2 million head for 1977 may be too optimistic. High calf slaughter in 1974/1975 and large slaughter of female cattle in 1975/1976 has reduced the potential supply of cattle for slaughter for the year beginning October 1976. In the first month of that year, slaughter was running only 50 percent of the year-earlier level.

Industry sources believe New Zealand's domestic consumption of beef and veal in 1977 will continue near the 1976 level of about 187,000 tons. Exports are forecast at 340,000 tons (carcass weight), only 17,000 tons below that of 1976. This suggests that an appreciable proportion of 1977 exports are expected to result from carryover stocks. This would virtually eliminate stocks of beef and veal, which were reported at 78,000 tons on October 21.

The recent 6.2 percent devaluation of the New Zealand dollar may result in higher retail prices for beef, which in turn could result in a reduction in domestic beef consumption, leaving more for export without depleting stocks. However, if cattle slaughter is appreciably lower than currently forecast, the total supplies available for consumption and export will be correspondingly lower.

Central America and the Caribbean

In the Central American and Caribbean beef exporting countries, cattle herd increased 3.5 percent in 1975 and 3.2 percent in 1976, to 11.2 million head. Slaughter in 1976 was up 7.1 percent from the 1975 level, to 1.8 million head; 17 percent of the cattle herd. For 1977, slaughter is expected to increase 4.6 percent to 1.9 million head, again at 17 percent of the cattle herd. Average carcass weights in 1976 were about 181 kilograms, unchanged from 1975 weights but down slightly from

those of 1974. Carcass weights in 1977 are expected to be up slightly. Beef production is expected to reach 391,000 tons in 1977, up 5 percent from that of 1976.

The United States is the main recipient of beef exports from this area. In 1977, it is expected that some of the beef exported to the United States will be shipped as processed products. There has been some shipment of Central American beef to other South American countries and to Israel, but this trade is less than 10 percent of total exports and is not expected to be important in 1977.

In 1977, U.S. imports of beef from Central America and the Caribbean, subject to the Meat Import Law, are expected to reach 96,843 tons (product weight), compared with the 91,515 tons imported in 1976. In addition, 2,427 tons of beef were imported outside the quota in 1976. This amount is expected to increase in 1977.

Mexico

For 1977, Mexican beef production is expected to increase 8.2 percent to 1.03 million tons and, if live cattle exports remain at 500,000 head, the cattle herd will remain at about 30 million head or unchanged from the January 1977 levels. Currently, beef exports by Mexico are forecast at 27,230 tons (product weight), or 37,400 tons (carcass weight). This would allow a 4.6 percent increase in domestic per capita consumption.

The United States imported 23,587 tons of Mexican beef in 1976, up 75 percent from that of 1975. "Maquila" beef (beef produced from U.S. cattle slaughtered in Mexico) accounted for 30 percent of Mexico's beef trade, compared with 68 percent in 1975.

As in 1976, Mexico's economic and political situation will be the most important factor affecting beef and cattle trade. Excessive trade deficits and inflation forced a sharp devaluation of the Mexican peso. The devaluation and subsequent speculation on further devaluations caused a sharp turnaround in Mexico's beef and live cattle exports. After the devaluation, Maquila beef exports, which had averaged nearly 40 percent of the total in the first 8 months of 1976, fell to less than 5 percent in the September-December period because of the unfavorable exchange rates. In the first 3 weeks of January, Mexican beef exports averaged over 500 tons per week, below those of last quarter 1976 rates but above first quarter 1975 and 1976 rates.

The devaluation of the peso also caused an upsurge in Mexican cattle exports to the U.S. market. In 1976, 507,826 head of Mexican feeder cattle were imported into the United States. About 67 percent of the total was imported in the last 2 months of the year. This volume of shipments is expected to continue into the first quarter of 1977.

Argentina

Argentina beef production in 1977 is expected to fall 5 percent to 2.625 million tons. Slaughter in 1976 was up 13 percent to 13.6 million head, but 1977 slaughter is expected to fall 8 percent to 12.5 million head. Carcass weights are expected to be up 4 percent to 210 kilograms in 1977, reflecting a slowdown in cow slaughter.

Argentine per capita supplies of beef were up 2 percent to 87 kilograms in 1976, but reduced slaughter and projected increased exports is expected to reduce per capita supply 13 percent to 76 kilograms in 1977, about equal to the 1974 level.

Argentine beef exports were 530,000 tons (carcass weight) in 1976, nearly double those of 1975 but still below the levels reached in the early 1970's. Exports in 1977 are projected to increase 23 percent to 650,000 tons. This level of trade is expected to be reached mostly through increased sales to East European markets and some increased sales to the EC and the Soviet Union.

Argentine steer prices have increased sharply in recent months. January steer prices were quoted at 50 U.S. cents per kilogram--up from 36 cents in June and 14 cents in January 1976. This is expected to encourage herd expansion in 1977 after 2 years of heavy cow slaughter.

Uruguay

Beef production in 1977 is forecast to increase 5 percent to 420,000 tons, compared with 400,000 tons in 1976. Slaughter was up 12 percent in 1976 to 2.05 million head. For 1977, slaughter is expected to reach 2.1 million head and carcass weights are expected to reach 200 kilograms, compared with 195 kilograms in 1976.

The Uruguayan cattle herd has been declining since June 1975, when cattle numbers reached 11.5 million head. Projected June 1977 numbers are down 11 percent from 1975 and 4 percent from June 1976 estimates. If slaughter reaches the expected 2.1 million head level, cattle numbers could be down a further 4 percent by June 1978. There has been a shortage of beef in local markets, and some export contracts may not be filled.

Per capita beef consumption in 1976 is estimated to have fallen 10 percent to 76 kilograms. Beef accounts for 80 percent of the meat available in Uruguay because relatively high grain export prices have discouraged local production of pork and poultry. Meat shortages could be a problem in 1977.

In 1976 beef exports reached 190,000 tons (carcass weight), a new record for Uruguary. For 1977, exports are forecast at 220,000 tons. However, to reach this level of exports, domestic consumption would have to fall to 71.6 kilograms per capita, 5 percent below 1976's levels but still above 1972 and 1973 per capita consumption.

TABLE 1--BEEF AND VEAL: WORLD IMPORTS BY SELECTED COUNTRIES AND TOTAL FOR ALL COUNTRIES, 1973 TO DATE--CARCASS WEIGHT EQUIVALENT

(In thousands of metric tons)

Country	1973	1974	1975	Estimate 1976	Forecast 1977 1/
United States	917	747	803	880	895
EC-9 2/	985	433	200	185	300
Canada	104	84	91	142	87
Japan	194	84	67	128	112
Spain	81	14	32	20	26
Greece	63	26	49	50	55
Switzerland	41	20	15	20	20
Germany, East	46	20	35	40	46
USSR	16	289	300	275	250
Chile	18	44	5	5	5
Portugal	20	35	24	30	35
Other countries	306	262	650	900	900
Total 1/	2,791	2,058	2,271	2,675	2,731

1/ FAS estimates. 2/ Excludes intra-trade.

TABLE 2--BEEF AND VEAL: WORLD EXPORTS BY SELECTED COUNTRIES AND TOTAL FOR ALL COUNTRIES, 1973 TO DATE--CARCASS WEIGHT EQUIVALENT

(In thousands of metric tons)

Country	1973	1974	1975	Estimate 1976	Forecast 1977 1/
P.L. 88-482: 2/					
Australia	920	505	746	870	900
New Zealand 3/	316	267	333	357	340
Canada	41	27	21	63	65
Mexico	39	19	14	21	27
Central America 4/	132	115	124	138	154
Subtotal	1,448	933	1,238	1,449	1,486
EC-9 5/	82	207	220	200	100
Argentina	500	289	266	530	650
Uruguay	109	120	113	190	220
Other countries	703	530	525	500	500
Subtotal	1,394	1,146	1,124	1,420	1,470
Grand total	2,842	2,079	2,362	2,869	2,956

1/ FAS forecast. 2/ Excludes Ireland. 3/ Year ending September. 4/ Includes Dominican Republic and Haiti. 5/ Excludes intra-trade.

TABLE 3--BEEF AND VEAL: CONSUMPTION, PRODUCTION, AND IMPORTS FOR UNITED STATES, EC-9, AND JAPAN, 1971 TO DATE--CARCASS WEIGHT EQUIVALENT

Country and year	Per capita consumption		Domestic production		Imports 1/				Wholesale prices 2/	
	Quantity	Index 1971 - 100	Quantity	Index 1971 - 100	Quantity	Index 1971 - 100	As percent of produc-	Share of world imports	Cents per kg.	Index 1971 - 100
	Kgs.		1,000 M.T.		1,000 M.T.					
United States:										
1971	52	100	10,182	100	797	100	8	39	107.14	100
1972	54	104	10,377	102	905	114	9	35	116.62	109
1973	51	98	9,813	96	917	115	9	33	142.37	133
1974	54	104	10,716	105	747	94	7	36	144.14	135
1975	56	108	11,271	111	803	101	7	36	150.50	140
1976 3/	58	112	12,200	120	880	110	7	32	127.36	119
1977 4/	55	106	11,600	114	895	112	8	32	140.00	131
EC-9:										
1971	25	100	6,058	100	560	100	9	28	143.03	100
1972	25	100	5,506	91	952	170	17	37	186.62	130
1973	25	100	5,575	92	985	176	18	35	237.94	166
1974	27	104	6,585	109	433	77	7	21	229.98	161
1975	25	100	6,598	109	200	36	3	9	276.81	194
1976 3/	25	100	6,390	105	185	33	3	7	281.00	196
1977 4/	25	100	6,050	100	300	54	5	11	300.00	210
Japan:										
1971	3	100	275	100	63	100	23	3	238.89	100
1972	4	133	295	107	87	138	29	3	280.34	117
1973	4	133	227	83	194	308	85	7	478.31	200
1974	3	100	293	107	84	133	29	4	396.39	166
1975	4	133	339	123	67	106	20	3	487.37	204
1976 3/	4	133	283	102	128	203	45	5	578.00	242
1977 4/	4	133	320	116	112	177	35	4	650.00	272

1/ Intra-trade excluded for EC-9 and world total. 2/ U.S. Dressed fresh beef, Good--600-700 pounds; Midwest, EC-9, Hamburg--wholesale price of bullock and heifers. Japan, fattened Wagyu cattle. 3/ Preliminary. 4/ Estimate.

TABLE 4--MEAT PRODUCTION IN MAJOR IMPORTING AREAS, 1973 TO DATE--CARCASS WEIGHT EQUIVALENT
(In thousands of metric tons)

Commodity and country	1973	1974	1975	Estimate 1976	Forecast 1977
Beef and veal:					
United States	9,813	10,716	11,271	12,200	11,600
Canada	897	942	1,050	1,134	1,092
EC-9	5,575	6,585	6,598	6,390	6,050
Japan	227	293	340	283	320
Total	16,512	18,536	19,259	20,007	19,063
Pork:					
United States	5,784	6,262	5,128	5,530	6,300
Canada	617	611	495	476	485
EC-9	7,641	7,898	7,667	7,750	8,000
Japan	842	958	910	910	970
Total	14,884	15,729	14,200	14,666	15,755
Mutton and lamb:					
United States	233	211	186	170	175
Canada	10	8	8	8	8
EC-9	483	508	516	520	505
Japan	1	1/	1/	1/	1/
Total	727	727	710	698	688
Poultry: 2/					
United States	4,871	4,938	4,823	5,435	5,455
Canada	473	469	405	456	455
EC-9	3,188	3,126	3,101	3,275	3,360
Japan	698	740	752	842	910
Total	9,230	9,273	9,081	10,008	10,180
Total meat:					
United States	20,701	22,127	21,408	23,335	23,530
Canada	1,997	2,030	1,958	2,074	2,040
EC-9	16,887	18,117	17,882	17,935	17,915
Japan	1,768	1,991	2,002	2,035	2,200
Total	41,353	44,265	43,250	45,379	45,685

1/ Less than 500 metric tons. 2/ Product weight basis.

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TABLE 5--NET MEAT IMPORTS IN MAJOR IMPORTING AREAS, 1973 TO DATE--CARCASS WEIGHT EQUIVALENT
(In thousands of metric tons)

Commodity and country	1973	1974	1975	Estimate 1976	Forecast 1977
Beef and veal:					
United States	875	718	784	835	850
Canada	63	57	70	79	22
EC-9 1/	903	226	-20	-15	200
Japan	194	84	67	128	112
Total	2,035	1,085	901	1,027	1,184
Pork:					
United States	156	166	99	5	75
Canada	-32	-5	4	39	37
EC-9 1/	-61	-69	-12	87	-29
Japan	153	60	107	170	110
Total	216	152	198	301	161
Mutton and lamb:					
United States	23	10	10	25	20
Canada	35	22	20	21	22
EC-9 1/	310	235	254	260	275
Japan	187	126	184	190	190
Total	555	393	468	496	507
Poultry:					
United States	-74	-80	-96	-173	-160
Canada	6	1	9	25	22
EC-9 2/	-74	-87	-61	-85	-95
Japan	25	25	18	29	11
Total	-117	-141	-130	-204	-222
Total meat:					
United States	980	808	797	692	785
Canada	72	81	103	164	103
EC-9 1/	1,078	305	161	247	351
Japan	559	295	376	517	423
Total	2,689	1,489	1,437	1,620	1,662

1/ Excludes intra-trade. 2/ Includes intra-trade, product weight basis.

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TABLE 6--PRODUCTION AND EXPORTS OF BEEF AND VEAL BY MAJOR EXPORTING COUNTRIES, 1973 TO DATE--CARCASS WEIGHT EQUIVALENT
(In thousands of metric tons)

Country	1973	1974	1975	Estimate 1976	Forecast 1977
Production:					
P.L. 88-482 countries:1/					
Australia	1,497	1,258	1,670	1,845	1,750
New Zealand 2/	449	405	507	605	510
Central America 3/	333	318	345	372	391
Mexico	745	844	889	955	1,030
Subtotal	3,024	2,825	3,411	3,777	3,681
Other:					
Argentina	2,152	2,145	2,411	2,750	2,625
Uruguay	256	330	345	400	420
Subtotal	2,408	2,475	2,756	3,150	3,045
Total	5,432	5,300	6,167	6,927	6,726
Exports:					
P.L. 88-482 countries:1/					
Australia	920	505	746	870	900
New Zealand 2/	316	267	333	357	340
Central America 3/	132	115	124	138	154
Mexico	39	19	14	21	27
Subtotal	1,407	906	1,217	1,386	1,421
Other:					
Argentina	500	289	266	530	650
Uruguay	109	120	113	190	220
Subtotal	609	409	379	720	870
Total	2,016	1,315	1,596	2,106	2,291

1/ Excludes Canada and Ireland. 2/ Year ending September. 3/ Includes Haiti and Dominican Republic.

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TABLE 7--PRODUCTION AND EXPORTS OF MUTTON AND LAMB BY MAJOR EXPORTING COUNTRIES, 1973 TO DATE--CARCASS WEIGHT EQUIVALENT
(In thousands of metric tons)

Country	1973	1974	1975	Estimated 1976	Forecast 1977
Production:					
Australia	572	471	547	600	585
New Zealand 1/	554	498	490	514	515
Argentina	128	112	117	120	120
Total	1,254	1,081	1,154	1,234	1,220
Exports:					
Australia	230	140	242	300	280
New Zealand 1/	435	394	397	402	400
Argentina	28	19	22	20	20
Total	693	553	661	722	700

1/ Year ending September.

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